
Preparing for a Color Review / Review Team Administrator Tips

A well planned and conducted Color Review is critical to improving the quality of a proposal. Companies that run ad-hoc Color Reviews can actually cause the proposal to be non-compliant, incomplete, and frustrate the Authors and Proposal Manager. Each company will have their own specific processes. These instructions should be tailored to your company procedures.

NOTE: You must first create a Master Document of your Volumes or entire Proposal prior to creating Color Review documents. See Creating Master documents for more information.

The following subsections give bullet points and tips to running a well planned Color Review as well as how to use the Proposal Geeks Color review Ribbon in the process. These are actual steps that one of our major clients shared with us that their Color Review Team Administrators follow. The bullets in plain text format are tips. ***The bullets with Color Emphasis are actual steps that must be performed.***

Prior to the Color Review Team In-Brief

- ▶ Send a standard email to each review team member to welcome them to the team, confirm computing needs, ensure all have Word 2007, and provide any additional information.
- ▶ Determine the location on the shared drive or network to house all Color Review Team documents.
- ▶ ***Create copies of the proposal documents to review and add ‘A_’ to the beginning of each file name.***
- ▶ ***Within each document, attach the corresponding Color Review Ribbon template. (Or use the DOCM files) Most Ribbons will already have this Ribbon attached.***
- ▶ ***Click the ‘Startup’ button on the Color Review Ribbon.***
- ▶ ***Complete the fields for a reviewer and click ‘Submit’.***
- ▶ ***When the Save dialog box appears, save the file under the reviewer’s name, beginning with ‘B_’.***
- ▶ You will now have two Word documents for each reviewer, one beginning with A_ and one beginning with B_. ***This is critical because the system works with a toggle command that will pull information from the A document and place it in the B document.***
- ▶ Save a copy of the Proposal Geek Excel Scorecard in the Color Review Team folder and make necessary updates or customizations. There is a Scorecard for four colors or five colors. Check Section M (Evaluation Criteria) of the RFP to determine which Scorecard is better for you.
- ▶ ***On the Author Tab of the Scorecard, enter the Author names that are working on the Proposal.***

	A	B	C
1	Author Names		
2	Assigned Options	Action Options	Status Options
3	Author 1	Accepted	Completed
4	Author 2	Accepted w/Comments	Incomplete
5	Author 3	Rejected	
6	Author 4		
7	Author 5		
8	Author 6		
9	Author 7		

This will help the Proposal Manager assign responsibilities to individual edits and comments from the Color Review.

- ▶ **On the Master Scorecard Tab, enter in the Volume Names for the proposal. Adjust the weight for each Volume under the Govt Weight column.** This will give your company an idea of how the entire Proposal Stacks up against the weights from the Government. Place a zero (0) by any extra Volumes you are not using or delete the Rows that you are not using. For instance, if there are only 4 Volumes and the Proposal Stated that 1 is more important than 2. 2 is more important than 3. That 3 and 4 are equal in importance, then you might change your Volume and Weights Something Like This: 1.0 Management (35%); 2.0 Technical (25%); 3.0 Past Performance (20%); and 4.0 Cost (20%). Then you would place 0% in the Generic Volumes 5 through 10.

	A	B	C	D
1	Proposal Name			
2	Overall Score	Green		100
3	Volume	Vol Score	Govt Weight	Weighted Score
4	1.0 Volume Name	100	10%	10
5	2.0 Volume Name	100	10%	10
6	3.0 Volume Name	100	10%	10
7	4.0 Volume Name	100	10%	10
8	5.0 Volume Name	100	10%	10
9	6.0 Volume Name	100	10%	10
10	7.0 Volume Name	100	10%	10
11	8.0 Volume Name	100	10%	10
12	9.0 Volume Name	100	10%	10
13	10.0 Volume Name	100	10%	10

- ▶ Make sure all reviewers have access to the share and are mapped to the corresponding drive. Or Send them their A and B documents if they are working remote. **NOTE: If you are using a Template rather than a DOCM, you will have to tell them how to attach the template to the A document if they are working remote.**
- ▶ Ensure that each reviewer will have their own laptop or desktop computer with Word 2007.

Conducting a Color Review Team In-Brief

- ▶ Provide a high-level description of the Color Review Tool, its purpose, the main benefits, and its general functions. (simulates customer review, objectively evaluates, ease of use, documents comments, involves A_ doc, B_ doc, and the scorecard, defined criteria)
- ▶ Many companies will have Power Point slides that they use to brief Color Review teams. Check with your Proposal Geeks representative if you would like us to send you some generic slides that introduce the Color Review Ribbon to the team.
- ▶ Confirm that each reviewer will have a laptop that has Word 2007.
- ▶ Include the Out-Brief presentation slides in the In-Brief to show the intended outcome.
- ▶ Make sure each member has a copy of the Expanded Compliance Matrix or a Copy of the RFP prior to their arrival.

The Day of the Review

- ▶ Present and demonstrate the Color Review Ribbon in detail including:
 - The documents
 - The review options/icons
 - The definition and use of each review option as defined by the Proposal Manager
 - The integration of the proposal documents, the review table, and the scorecard.
- ▶ Also assist in getting all reviewers up and running.
- ▶ Stress these critical items in the training:
 - Evaluation icons impact color rating of proposal. Comments just serve to make notes to the writers.
 - Graphics within a proposal cannot be selected for review. Select the figure number.
 - Feel free to go back and forth between documents, but ***DO NOT type any text below the table.*** You can only type and make edits inside the table. The table resets the cursor position at the start of every command. It does this by going to the end of the document and moving up one line into the bottom left cell of the table.
 - Only have one A_ document open at a time.
 - ***Do not open any other Word documents while you are reviewing.*** It is best to only have your A_ document and B_ document open in Word.

During a Break on the First Day of the Review

- ▶ After each reviewer has had the opportunity to use the tool for a couple of hours, present the use of the Scorecard including:
 - The scoring and totaling of comments
 - How they should consider reconciling comments prior to the Out-brief
 - The weights of each criteria
 - The corresponding color rating that results
 - The option of utilizing the tabs as part of the Out-Brief. The Score-Cards can be printed out as is, or they can be copied and pasted into a Power Point Presentation. These Score Cards not only give an estimated number and color rank for each section, but they also give the quantities and types of all the comments for each Volume.

Proposal Name				Color Review Score Card							
	Neutral	Score	Rank	1.0 Volume Name							
Estimated Score	100	0	100								
				100							
				Ranking Color		Low	High				
Scored Comments				Purple	125	300	Non-Scored Comments				
Risk	Qty	Weight	Score	Blue	105	124	Edits	0			
Low	0	-2	0	Green	95	104	Rephrase	0			
Medium	0	-5	0	Yellow	50	94	Addition	0			
High	0	-15	0	Red	-300	49	Deletion	0			
Clarification Requests											
Minor CR	0	-2	0	Comments							
Major CR	0	-5	0								
Deficiency Reports								None.			
Minor DR	0	-5	0								
Major DR	0	-15	0								
Weakness											
Minor Weakness	0	-5	0								
Major Weakness	0	-15	0								
Strengths											
Typical	0	10	0								
Unique	0	15	0								
Significant	0	15	0								
Relevancy											
Recency	0	-3	0								
Scope	0	-3	0								
Complexity	0	-3	0								
Contract Type	0	-3	0								
Dollar Value	0	-3	0								
Other-Relevancy	0	-3	0								
				Missing							
				Non-responsive							
				Organization							
				Not Required							
				Other-Compliance							

Prior to the Out-Brief

- ▶ *Gather all the 'B_' documents from the reviewers.*
- ▶ *Copy and paste their review comments into the corresponding tab in the Scorecard.*
- ▶ ***NOTE: If you will run a Find and Replace in the Word Document that Finds to Returns and Replaces them with a Single Return, this will allow a very clean Copy and Paste directly into the Excel Document. Without doing this, a Straight Copy and Paste will cause extra rows to be added in the Excel Edits Worksheet.***
- ▶ Share the findings with the review team

Reviewer	Sec #	Cat.	Type	Selection	Issue	Recommendation	Pg.
RA	1	Strength	Typical	Key requirements to hiring and retaining a multi-skilled workforce are to maintain a high operational tempo during the transition period and to provide rapid response to staffing surge requirements throughout the life of the contract.	Good understanding of the Customer Mission		20
RA	1	Strength	Unique	Features of our approach include--Effective Recruiting of the Incumbent Workforce- Teaming with Local Suppliers and Small Businesses-A Database of Over 4,000 Pre-qualified Candidates-Partnerships with Commercial and National Recruiting Services- interruption to mission success during the transition period.	Excellent set of strengths for recruitment	Mention that our key personnel are already employees and ready to start on day one after contract award.	21
RA	1.1	Risk	Low		We mention the interruption here, but show no mitigation.	I would add a pull quote or something that states 5 transitions in the past 4 years with degradation to mission success and an average of 98% award fee. Maybe put a quote from one of our CPARS.	22
RA	1.1	Weakness	Minor	There are eight positions that are considered hard-to-find positions due	We list these eight positions but never let them know what they are.	We should name these eight positions in a table and then add our remedy for these difficult challenges.	23
RA	1.2	Edit	Rephrase	Our staffing approach is so successful that we are implementing a penalty of \$1,500 a day	Poor use of the word "so"	Consider rephrasing	24
RA	1.2	Strategy	Customer Focus	We have transitioned four	Nice mention of the four, but we don't mention how they will relate to this client.	Let's mention that we have a dedicated transition team and a proven transition plan. We will be using the SAME team and a tailored transition plan to ensure we have thought of every possible task. This focuses on Mission First.	25
TC	1	Strength	Typical	Key requirements to hiring and retaining a multi-skilled workforce are	Good list of what it is important to the client	What if we added, "From our experience on four previous Air Force transitions, we identified two critical requirements "	20

- ▶ Sort the edits by page number and quickly look for any duplicate comments that the team should combine. This will keep the Color Review Team from giving conflicting suggestions. It will also give a more accurate Score since the same comment won't be counted twice.
- ▶ Make adjustments as needed
- ▶ Assist in the creating the Out-Brief charts if desired

At the Color Review Team Out-Brief

- ▶ Attend the Out-Brief to support the Color Review Team and to be present to answer questions concerning the Color Review Ribbon and Scorecard.